6.2   SURVEY NOTES

Introduction

The SURVEY NOTES Screen allows you to enter or view notes pertaining to a specific survey. Survey notes provide valuable information for future analysts who may be analyzing historical trends and need to know why data values have significantly changed. Examples of information that might be stored in survey notes include item code revisions, a change in how estimates are produced, significant increase or decrease in a particular estimate or item total, loss of a large respondent, or industry changes that significantly impact the data.

"Survey notes" contain information about the <u>survey</u>, where as the "notes" in the Review and Correction module contain information about a <u>specific respondent</u> (ID).

Survey notes are stored as an ASCII file in the SURVLIB directory. The filename for each note is assigned automatically by the program. It begins with "svn" and ends with ".dat". In between, there is a four-digit number to uniquely identify each note file (e.g., svn0001.dat). Survey notes may be added, deleted or updated. Any user with DATPRIV = 'U' or 'P' may add a note, however, only users with MGMTPRIV = 'P' may edit or delete an existing note.

The Survey Notes screen allows you to:

> ➤ View existing survey notes.
>
> ➤ Add a survey note.
>
> ➤ Edit an existing survey note.
>
> ➤ Delete an existing survey note.

Accessing the Screen(s)

● Click on the MIS button from the StEPS Main Menu.

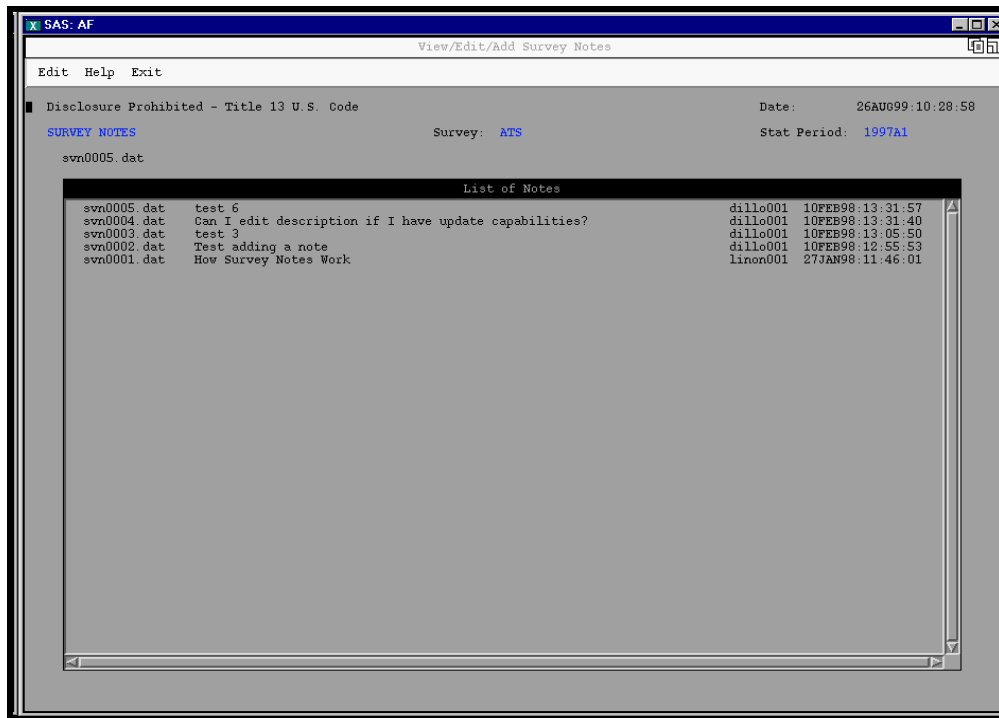● Click on the Survey Notes button from the MIS Menu to display the following:

Figure 6.2.1   Survey Notes Screen

Screen Features

- The survey and stat period currently being processed are displayed at the top of the screen.

- Each existing note (for the survey specified in the header) is listed in the "List of Notes" box. This box contains 4 columns of information:

Column 1	Filename of note.
Column 2	Description of note (assigned at the time the note was created.)
Column 3	Username of person who added or last updated the note.
Column 4	Date and time that the note was added or last updated.

- Click on a specific note to view its text.

6.2.1   Add a Survey Note

To add a survey note:

1. Click on the EDIT p-menu.

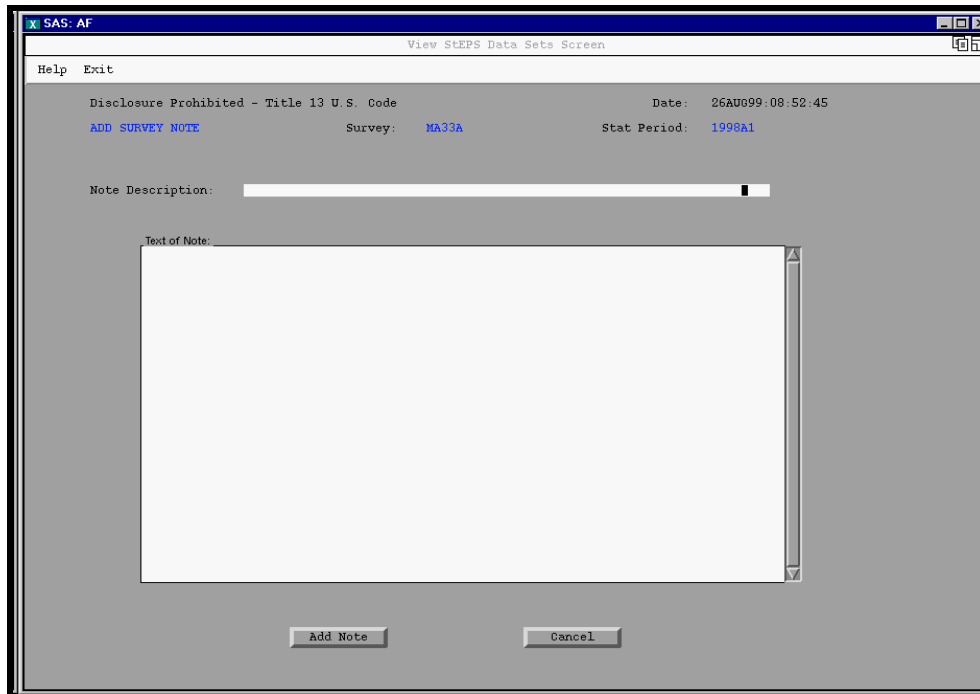2. Select the "Add note" option to display the following:

Figure 6.2.2   Add Survey Notes Screen

3. Enter a description of the note in the "Note Description" field. The description that you enter here will be displayed on the main Survey Notes screen that appears when you first choose the Survey Notes option form the MIS menu. Be sure that it is something meaningful so that an analyst other than yourself will be able to recognize the topic of the note.

4. Enter the note in the text box.

5. After entering the note, select the "Add Note" button at the bottom of the screen to save it.

6. If you have entered a note and have decided that you do not want to save it, click on the "Cancel" button at the bottom of the screen.

6.2.2 View/Edit a Survey Note

To view or edit a survey note:

1. Click on the specific note you want to view or update (from the Survey Notes screen). This will display the following screen, containing the text of the note selected:
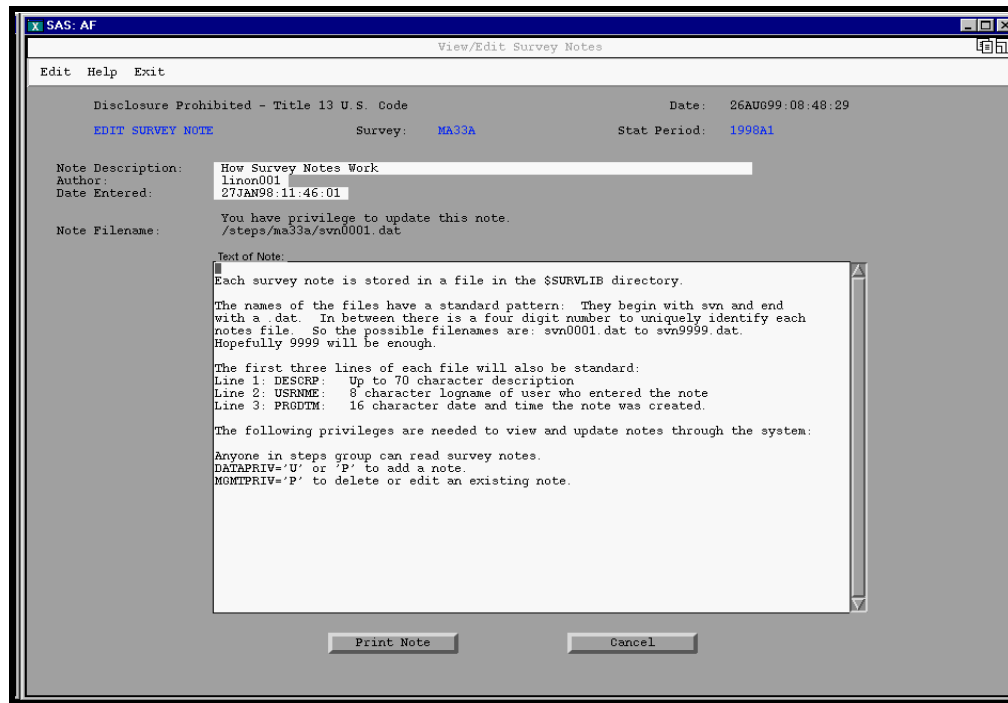

Figure 6.2.3   View / Edit Survey Notes Screen

The note description, username of person who added or last updated the note, and the date the note was added (or last updated) are displayed at the top of the screen.

2. If you have MGMTPRIV = 'P', you may edit the note description or the note text. Enter your changes in the appropriate field(s).

3. Once you have entered your changes, click on the EDIT p-menu and select the "Apply changes" option or press 'F2'. A confirmation message will display, indicating that the note has been updated.

4. To print the note displayed on the screen, click on the "Print Note" button at the bottom of the screen. A copy of the note will be sent to your default printer.

6.2.3   Delete a Survey Note

To delete a survey note:

1. Highlight the note you want to delete from the Survey Notes screen. This will display the "Edit Survey Note" screen for the note selected.

2. Click on the EDIT p-menu and select the "Delete note" option.

3. A confirmation message will display. Click "Yes" to delete the note and "No" if you do not want to delete the note.

P-Menu

Survey Notes Screen

P-Menu	Options	Function
EDIT	Add note	Add survey note
HELP	How Survey Notes Work WhoamI (F7)	Display HELP information on using the Surveys Notes screen Display user default and systems information
EXIT	StEPS Main Menu (Home) Exit (F3)	Return to StEPS Main Menu Exit to previous screen

Add Survey Note Screen

P-Menu	Options	Function
HELP	WhoamI (F7)	Display user default and systems information
EXIT	Exit (F3)	Exit to previous screen

View / Edit / Delete Survey Notes Screen

P-Menu	Options	Function
EDIT	Apply changes (F2) Delete note	Apply changes to the database Delete selected note
HELP	WhoamI (F7)	Display user default and systems information
EXIT	Exit (F3)	Exit to previous screen